



DEEPALI DHYANI

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Objective: - To widen my horizon in financial services by inculcating industry-relevant skills and learning new sprung techniques associated with the profession.

CERTIFICATIONS & LICENSES

- MBA, Finance & Business Analytics
- Financial Modelling & Valuations
- NISM VIII (Equity & Derivatives)
- NISM XA (Investment Advisor)

TECHNICAL SKILLS

- Microsoft Excel (Advance)
- Microsoft PowerPoint
- Business Automation
- R Programming
- Tableau
- SQL

OTHER SKILLS

- Strong Decision making + Problem solving skills
- Strong Interpersonal + Communication skills
- Ability to deliver results within Deadlines

EXTRA CURRICULAR ACTIVITIES

- Coordinated in Annual Sports meet at New Delhi Institute of Management
- Participated in workshops.
- Volunteer in Vittiya Saksharta Abhiyan organized by Government of India.

PERSONAL SNIPPET

- Date of Birth:** 1st October 1994
- Address:** 3/58, Old Double Storey Lajpat Nagar IV, Delhi-110024
- Languages Known:** English and Hindi

WORK EXPERIENCE

Master Capital Services Ltd. || Delhi

Jun'20-Present

- Analyzing the financial performance of the client's portfolio to determine key drivers impacting their goals.
- Providing analytical perspective to critical strategic decisions.
- Making recommendations as to which funds should be included in portfolios.
- Offering investment advice to clients and constructing portfolios as per their requirements.
- Providing financial, analytical support to private equity owners and institutions.
- Preparing monthly financial reports for clients, including variance analysis.

KW Wealth Advisors Pvt. Ltd. || Delhi

Jan '18-May '20

- Provided investment advice, helped clients in constructing portfolios and execution of plans by understanding their objectives.
- Created goal-based financial plans and reviewed them periodically.
- Prepared dashboards, financial reports, MIS reports for tracking monthly sales and growth.
- Analyzed the performance of the funds every quarter and made a bucket list of the recommended investment funds.
- Carried out monthly reconciliation of all transactions with various Registrar and Transfer agents and made it error-free.
- Maintained and monitored investments, including inflows, outflows, valuations, risk ratings and performance analysis.
- Prepared weekly reports and led presentations for training the new staff.
- Effectively collected, analyzed and managed quantitative data that resulted in business improvement and cost reduction.
- Streamlined spending analysis and transformed it into a more accurate, efficient and automated process.

EDUCATION

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| 2018 | Master of Business Administration | New Delhi Institute of Management |
| 2015 | Bachelor of Commerce | Pyare Lal Nand Kishore Galvaliya |
| 2012 | Intermediate (Commerce) | Kendriya Vidyalaya |
| 2010 | Matriculation | Kendriya Vidyalaya |